Retail Competition Under Pressure: Branding, Pricing, and Consumer Response

Gokhan Yildirim
Imperial College London
Shuba Srinivasan
Boston University, Questrom School of Business
Lina Altenburg
Erasmus University Rotterdam
KRISTOPHER KELLER
Greta Siracusa
LIUC - Universit� Cattaneo
Lijing wang
Imperial College London

Cite as:
Yildirim Gokhan, Srinivasan Shuba, Altenburg Lina, KELLER KRISTOPHER, Siracusa Greta, wang Lijing (2026), Retail Competition Under Pressure: Branding, Pricing, and Consumer Response. *Proceedings of the European Marketing Academy*, 55th, (133818)

Paper from the 55th Annual EMAC Conference, Bath, United Kingdom, June 2-5, 2026

EUROPEAN MARKETING ACADEMY

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Special Session Abstract

Retail competition in grocery and FMCG markets is undergoing rapid transformation. Retailers increasingly leverage pricing architectures, private-label strategies, and brand portfolio decisions to manage profitability in an environment marked by rising costs, heightened consumer price sensitivity, and evolving competitive threats. At the same time, shoppers are responding to these pressures by dynamically adjusting their brand choices, store format preferences, and spending patterns. This special session brings together four complementary papers that jointly shed light on how pricing shifts, private-label strategies, branding decisions, and inflationary pressures shape retailer and manufacturer performance, category outcomes, and consumer behavior.

In the first paper, *"Who Wins the (Regional) Contest Between National and Private Label Brands, and Why,"* Altenburg, Neslin, Pauwels, and Srinivasan analyze market power across U.S. regions. Using consumer-panel and retail-scanner data enhanced with geographic variables, they develop a framework integrating supply- and demand-side drivers of price and volume premiums. Their results reveal how regional differences crucially shape the competitive balance between national brands and private labels.

In the second paper, *"The Costs of Opening an Umbrella: How Store-Brand Umbrella Branding Affects National Brand Profits,"* Bombaij and Keller examine how consolidating private labels under one umbrella brand affects national brand profitability. Using confidential SKU-level pricing and profit data with a synthetic difference-in-differences design, they show that umbrella branding can significantly reduce national brand profits. They identify supply-chain mechanisms behind this heterogeneity and offer strategies to mitigate channel conflict.

In the third paper, *"From Deals to Stability: The impact of pricing policy transformation on store and category performance in grocery retail,"* Siracusa, Breugelmans, and Mauri study a retailer's shift from Hi-Lo to EDLP pricing. A quasi-experimental design using scanner and loyalty data shows that EDLP raises overall store and category sales but with substantial category heterogeneity. Category characteristics—such as promotion intensity, hedonic nature, perishability, and purchase frequency—explain which

categories gain from stable prices and which rely on promotions.promotions. Their insights underscore the importance of tailoring pricing policies to category-specific dynamics.

In the fourth paper, *"Price Changes and Consumer Purchasing Patterns During Price-Surging Period,"* Wang, Zhu, and Yildirim analyze how UK inflation altered retailer pricing and household behavior from 2019–2022. Using household-panel transactions, they document uneven price changes across categories, channels, and private-label tiers, as well as shifts in brand choices and store formats. By constructing household price indices and classifying trip types, they show how inflation differentially affected households and shaped substitution behavior.

Together, these four papers offer a multifaceted perspective on how retailer strategies and market conditions interact to shape competitive outcomes, consumer responses, and firm profitability. By integrating insights on branding, regional competition, pricing architecture, and inflationary market dynamics, this session provides a cohesive and timely contribution to understanding retail resilience in a shifting marketplace.